Training, Technical Assistance, and Practice-Based Learning in the Field Development Process

From the beginning, the aim of the EFF/NRS Data Collection Project was to develop products, tools, and procedures that would enrich the NRS Educational Functioning Level descriptions and that would support valid and reliable measures of educational gain using standardized alternative assessments. For states that have chosen to give adult education programs an alternative to assessing educational gains with existing standardized test instruments, the currently available qualitative descriptions of levels of knowledge, skills, and abilities in the NRS Educational Functioning Levels are not specific enough to provide a basis for developing alternative assessment tasks and scoring guidelines. Recognizing that the current descriptors were not designed to be used for assessment purposes, USED/DAEL and NIFL jointly sponsored the EFF/NRS Data Collection Project as a means of collecting and analyzing adult learner performance data that could be used to create more specific and detailed qualitative descriptors for each NRS skill area. The expected outcomes of the joint project were enriched performance-level descriptors and a set of performance assessment tasks that could be used to mark the transition from level to level on the NRS.

Beyond these specific expected outcomes, there were several additional benefits expected from the EFF/NRS Data Collection Project. Among these expected benefits are the possibilities of developing tools for measuring educational gains that are more sensitive to smaller increments of change and more closely aligned with adult learner and adult education program goals than those found in currently available standardized tests. Also, as adult education moved to the more rigorous accountability requirements of the AEFLA (Title II, WIA), there was wide concern that insufficient training in assessment procedures used by practitioners in the field would lead to problems in the validity and reliability of the educational gains data required for accountability. DAEL and NIFL believed that the considerable training and technical assistance that was part of the EFF field-based research procedures would result in the states in which we are working in a cadre of practitioners more experienced in assessment. Moreover, it was believed that the EFF field-based research would produce a set of tools that would assist other practitioners and other states in putting into place a more rigorous approach to assessment and reporting.

Teacher/researchers in the EFF/NRS Data Collection Project received training and tools to help develop their expertise in the specific tasks required for the research process by

- constructing a performance task that targeted one of the EFF Standards and that was appropriately challenging for the students' skill levels,
- developing a clear and detailed picture (understanding) of the knowledge base required to per-

form the task so that the task could be used as a guide for instruction as well as an opportunity to collect evidence of performance,
- constructing tools to collect evidence of student performance on the task in relation to the four Dimensions of Performance, and
- developing descriptions of student performance, relative to the four dimensions, that were sufficiently detailed to enable multiple practitioners to reach agreement on where to place the performance on a continuum of such performances.

In order to assist practitioners in collecting and reporting the kind of rich and useful data that we would need to gather in the proposed research process and in response to what we learned about that process from the practitioners along the way, we developed several tools. Below, we describe these tools in more detail, explaining why we developed them and how teachers used them in the data collection process. A copy of each form or tool is found in Appendix B. The tools include
- a performance template, which is an array of increasingly complex generic descriptors of performance along all four dimensions;
- a definition of an EFF Performance Task and a graphic that embeds the Performance Task in the teaching and learning process;
- a task template consisting of an array of increasingly complex generic descriptors for the knowledge that a task requires and for the conditions of performance of the task to assist teachers in rating the objective complexity of the task;
- a Performance Task Worksheet to guide teachers through the process of creating and analyzing a performance task;
- a set of criteria for well-constructed performance tasks; and
- teacher and student observation forms.

The Performance Template: A Key Tool for Building the Performance Continuum

The Guiding Principles for the EFF Assessment Framework called for a single continuum of performance for all adults. In envisioning such a continuum, we drew on our knowledge of research on adult cognition and learning. We wanted to build a "continuum" for each EFF standard that represented a rich developmental picture of adult applied knowledge and skills—a picture that included all adults, that encompassed a lifetime of learning, and that articulated learning as movement from novice to expert performance. Our work on the NRS/EFF Data Collection Project focuses only on that part of each continuum that represents the performance of adults participating in the current adult literacy/basic education/ESL system and aims to ensure that each continuum reflects what adult performance really looks like in the classrooms and instructional settings of that system.

The EFF Performance Template was the starting point for using field data to construct a developmental performance continuum based on the four dimensions. It provided teachers—researchers with a set of research-based generic criteria to guide and standardize the process of placing detailed observations of ABE and ESL learner performance at appropriate points along a developmental performance continuum from novice to expert. The Performance Template is organized around three observation categories—Knowledge Base, consisting of what learners know; Performance, including both fluency and independence; and Range, describing the kind and number of tasks and contexts—that reflect the four dimensions (see Figure 2).

Performance descriptions keyed to these observation categories were presented in 10 consecutive

Figure 2. EFF Performance Template Questions

GUIDING PRINCIPLES FOR DEVELOPING THE EFF ASSESSMENT FRAMEWORK	
DIMENSIONS OF PERFORMANCE	
Knowledge Base *What do learners know?*	1. What vocabulary do learners have related to the skill? Related to the subject area? 2. What content knowledge do learners have related to the skill? Related to the subject area? 3. What strategies do learners have for organizing and applying content knowledge? • Can learners recognize or create new relationships or connections? • Can learners identify information that is important to the task, problem, or both? • Can learners understand when information or concepts apply?
Performance *How well can learners perform, including both fluency and independence?*	1. How fluently can learners perform? • How much effort is required? • How consistently do learners start and finish when getting to the desired outcome? • How well are barriers controlled or overcome? 2. How independently can the learners perform? • How much help is needed from others? • How much initiative is shown in getting started? • How often do learners generate their own strategies to complete the task?
Range *What kind and number of tasks can they perform and in what context?*	1. What kinds of tasks do learners carry out? • How complex is the task? • How many different kinds of tasks can learners perform? 2. In what contexts can learners perform? • In what kinds of circumstances can learners perform? • In how many different situations can learners perform?

(relative but not absolute) ranges, in part so we could look closely at performance in 10-point ranges from 0–60. By focusing on the 0–60 range, we were able to obtain richly detailed descriptions of adult learner performance at the levels covered by adult literacy/ABE/GED/ESL programs and described in the six ABE and six ESL Educational Functioning Levels of the NRS. The descriptions on the template were devised as generic "markers" that describe increments of growth; they focus on changes in key features on each dimension and will be revised, expanded, and further specified for each Standard, based on teacher documentation.

A More Comprehensive Picture of Learner Abilities

Teachers tell us that using the EFF Performance Template was initially challenging; its language sometimes seemed vague and repetitive (an inevitable consequence of its generic nature and the incremental change that it suggested along the continuum), and it took a lot of time to document performance from so many "angles." As they became more experienced in using the template, however, they came to appreciate how it allowed them to see a much more comprehensive picture of their learners' abilities than they had before. They used it as a guide to what prior knowledge they should take into account as well as what new knowledge and skills for which they should look—what specific behaviors to identify—when they assessed learner performance. Meanwhile, the data that they provided by using the template allowed us to refine and expand the descriptors in each range.

Midway through the year, the template was restructured in response to feedback from ESL teachers. They requested "more room" for rich descriptions at the 0–20 ranges in order to take into account everything that some ESL learners (particu-

larly those who are not literate in their native languages) need to learn to accomplish tasks in this range. Two new columns were added in the 0–20 range through all dimensions. These are still relative "placeholders" and not absolute ranges, but they are meant to allow for more "granular" description at lower points on the continuum.

"The performance template helps me to know that there's more involved than watching them do the task or reading their completed assignment. I now can identify such areas as how well they perform, at what rate, and with how many mistakes, etc."

"Looking back into my past teaching years, I realize that I have been teaching and assessing real-life activity lessons in the classroom, just not under the title of 'Performance Task.' What is new is the use of the template or rubrics to do a more holistic assessment. I find this to be a much better method of assessment because you see the student's abilities in many different angles. I still do 'traditional' methods of teaching and assessment, such as grammar, pronunciation, spelling, dictation, etc., but I see them now as pre-performance-readiness activities."

Definition of an EFF Performance Task: Targeting the Standard

Building the continuum for each Standard required reliable data on the performance of each EFF Standard. To make sure that activities being documented by teachers—researchers squarely focused on the full Standard (including all of the Components of Performance)—we asked teachers to observe and document learner performance of a particular Standard in what we termed "well-structured EFF Performance Tasks." We offered the following definition: "A well-structured EFF Performance Task is a learning activity that meets learners' purposes and addresses all components of an EFF Standard. It represents a real-world, adult use of the targeted Standard that can be analyzed according to the four Dimensions of Performance."

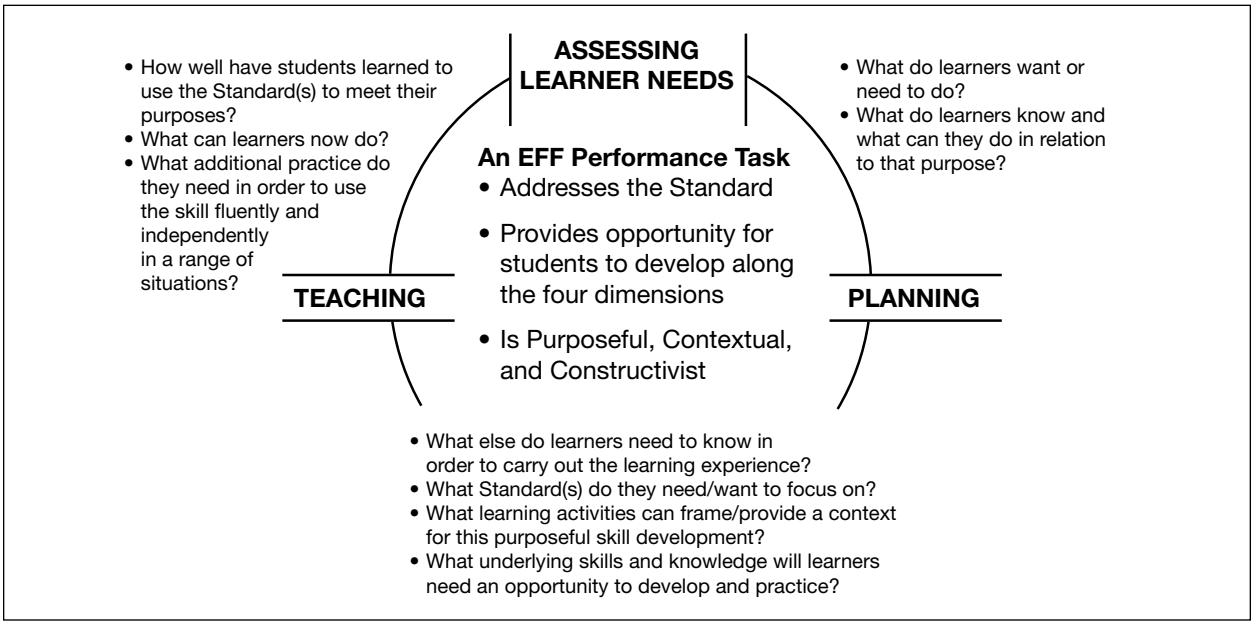
A Set of Criteria for Well-Structured Performance Tasks

In Chapter 3 of the Field Guide, developed for teacher/researchers as an orientation and preparation for the 2000–2001 field research, we articulated four criteria for defining and rating well-structured EFF Performance Tasks. These criteria, the basis for the worksheet described below, were clarified and revised during a midcourse meeting in February 2001 of representatives from all field research sites.

The revised Criteria for a Well-Structured Performance Task read as follows:

- The EFF Standards represent the knowledge and skills adults need to achieve important purposes in their lives. A well-structured performance task represents one instance of a meaningful use of the standard.
- A well-structured performance task identifies the evidence that will be used to determine how well the standard was used to carry out the task.
- A well-structured performance task is defined specifically enough so that knowledge-base requirements are clear.
- A well-structured performance task sufficiently focuses on the targeted standard and its components of performance so that performance can be rated.
- A well-structured performance task has immediate use or high transfer value for the learner.

Figure 3. Teaching and Learning With EFF Standards



As teachers used these criteria to develop and implement performance tasks, they found that doing so had important implications for how they planned and actually carried out instruction, as well as for how they observed and documented learner performance. Many reported that their learners were responding in positive and powerful ways to these changes in how they approached teaching. For example, as teachers involved learners more in planning learning activities, they found themselves stepping more into the role of facilitating learning. They noted that learners responded positively to the opportunity to participate more actively in their own learning and to the opportunities performance tasks afforded to contextualize skill development in activities they found to be meaningful and important.

"I don't spend as much time as before in front of the class 'teaching' vocabulary or whatever; the students spend more time now applying their learning in real-life applications. I now spend more time and energy thinking about and developing tasks that will be meaningful for the students. The students seem to understand that important indications of their learning happens during their performance of these EFF tasks. They want to include these EFF artifacts in their portfolios as examples of their best work."

Embedding Assessment in the Teaching and Learning Process

A key learning throughout the process of developing and documenting performance tasks was about the nature and role of assessment: Who does it, how, and when or at what points can we look for evidence of learning? Planning and implementing performance tasks that were meaningful to learners, rigorous in their application of the full Standard, and, therefore, effective in producing useful performance data, required teachers to think about and "embed" assessment through all the steps of the planning, teaching, and learning cycle. The performance task development process further encouraged teachers to devise multiple strategies for eliciting evidence of learning at various points in the teaching/learning experience. Those were often innovative, performance-based strategies that included learner dialogue, reflection, and self-monitoring. Based on this learning, we developed a new tool for teacher/researchers to use as they constructed more performance tasks. This new tool is in the form of a graphical representation of how a well-structured performance task informs all aspects of the planning, teaching, and assessing cycle (see Figure 3).

"In this learning process, the students were full participants. The students were motivated to do the task because the task was real to them and relevant to their lives. The students made connections between the subject matter and how to use the subject in their lives instead of thinking that school is 'stuff' they learn in school and will never use again. As a teacher, this type of teaching was creative, exciting, and individualistic. I was more of a facilitator in the process than usual. It was different than the way I usually teach because each student could apply the lesson to themselves and their lives."

"Though ESL teachers inherently know that time is critical for mastering language, we get caught up in deadlines and progress testing and imposed or perceived curriculum demands. Creating a well-structured, step-by-step process for students to get to their final writing piece (contrasting past, present, and future English learning) made this learning activity easy for the students and for me. Once they got started, it seemed there was no stopping them. And yet I worried that it was taking too much time. I wondered if the increased fluency that I saw had to do with the topic, the process, or both."

"My teaching has become very focused. The performance task has been integrated into the lessons and curriculum, but my emphasis is always on the performance of the specific task. Starting with the task and working backwards in the lesson-planning process is opposite of the way I used to plan and teach. Formerly, I would choose a theme or unit (that may or may not have been chosen by the students) that I felt was important. Then I would develop a scope and sequence. Tasks would be teased out along the way as they developed. Emphasis would be placed where students needed help. There was never really any real product or end performance except for the GED test. The EFF Framework has changed my approach. It is useful in that most students become involved. They like having a concrete task toward which they are working."

The EFF Performance Task Template

Teacher/researchers not only developed and implemented well-structured EFF Performance Tasks, they were also describing and rating the "objective difficulty" of those tasks. Rating Performance Tasks along a continuum of increasing complexity helped teachers be sure that

- the proposed tasks were appropriately challenging (not too easy or too difficult) for learners at a given "level,"
- they could think about what learners already knew and could do that would contribute to successful completion of the proposed tasks,
- they could define what more the learners needed to know and be able to do in order to successfully perform the tasks and how much or what kinds of "scaffolding" might need to be built in to activities, and
- they would have a sound basis of comparison for documenting learner performance of the task.

To assist practitioners in this process, we developed a Task Template, adapted from the structure, content, and theoretical foundations of the Performance Template. The Task Template focuses on six ranges of complexity, contexts, and knowledge-base requirements for proposed tasks, and the template supports users in richly describing and consistently rating their tasks for these characteristics. In the task example found in Appendix C, the teacher used the task template to guide her detailed descriptions of the requirements of a task that involved reading the classified ads to find affordable and suitable housing.

"Our [team] conversations are usually centered on helping one another see the relative difficulty of the task and rating it on the Task Template, based only on the task's difficulty rather than on how well our particular students may be able to perform. Having the other ESL, Even Start, and ABE instructors involved in our group is useful in allowing us to bounce ideas around and to ensure that the task is being rated on the difficulty for all students, not just our own."

The worksheet for developing a well-structured performance task is very helpful—but I work backwards through it. By the time I finish, I have a clear task and better plans for the lessons leading to the task. After [the project midcourse meeting] I have a much better idea of how to write the tasks. Now that a 'clear, succinct task' is the goal, I feel I have a better teaching objective and a better means for measuring student achievement."

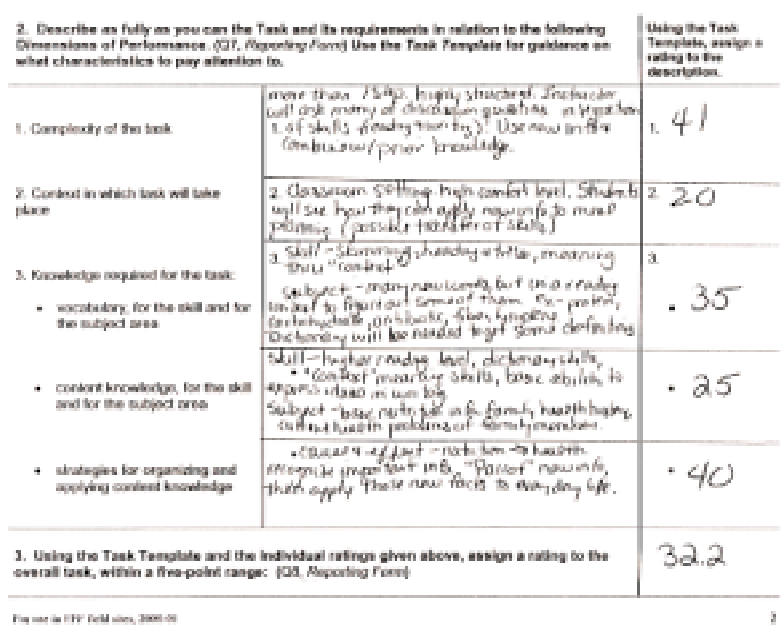
"In developing this task, the things that were the most helpful were integrating the Standard into the task, looking at the student's purpose for wanting to improve in this skill area, and working with other staff members to develop the task. Student interest and need to work on the concept of cooperation in the worker role acted as a guide for developing this task."

Performance Task Worksheet: Targeting Instruction to Student Need

As can be imagined, the process of going back and forth between the Standard and the Dimensions of Performance as described in the generic task template in order to develop a well-structured Performance Task was complicated. To help teachers think clearly about the structural requirements of their tasks, and to provide a way to keep track of their notes, a worksheet (Figure 4) was developed that mirrored the questions found on the Data Reporting Form, with additional prompts to make sure that the task was fully analyzed and rated.

During the first reporting period (October–December 2001), teachers forwarded a completed worksheet to their field assistant, who reviewed the task analysis and gave feedback on ways to sharpen the focus on the standard. Later, with more experience under their belts, teachers did not need to use this worksheet; but many continued to do so, finding it to be a useful way to develop a complete and well-structured Performance Task. They noted that using the worksheet helped them feel surer that the tasks they developed were appropriate to

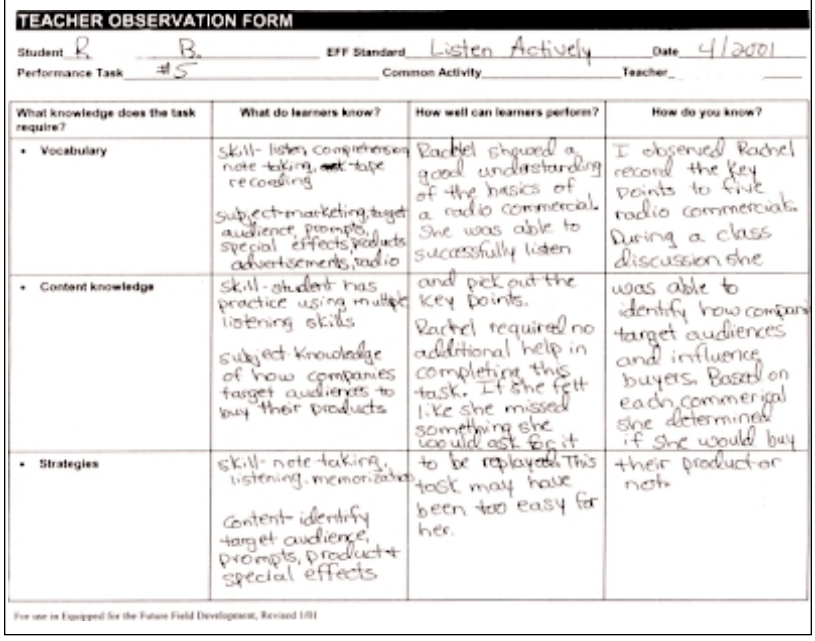
Figure 4. Performance Task Worksheet.



2. Describe as fully as you can the Task and its requirements in relation to the following Dimensions of Performance. (Q7, *Reporting Form*) Use the Task Template for guidance on what characteristics to pay attention to.		Using the Task Template, assign a rating to the description.
1. Complexity of the task	[illegible]	1. 41
2. Context in which task will take place	2. Classroom setting high comfort level. Students will see how they can apply ... [illegible]	2. 20
3. Knowledge required for the task:	3. [illegible]	3.
• vocabulary, for the skill and for the subject area	[illegible]	.35
• content knowledge, for the skill and for the subject area	[illegible]	.25
• strategies for organizing and applying content knowledge	[illegible]	.40
3. Using the Task Template and the individual ratings given above, assign a rating to the overall task, within a five-point range: (Q8, *Reporting Form*)		32.2

For use in EFF field sites, 2000-01 2

Figure 5. Teacher Observation Form



TEACHER OBSERVATION FORM

Student R. B. EFF Standard Listen Actively Date 4/2001

Performance Task #5 Common Activity Teacher

What knowledge does the task require?	What do learners know?	How well can learners perform?	How do you know?
• Vocabulary	Skill- listen, comprehension, note-taking, ~~note~~ tape recording subject-marketing, target audience, prompts, special effects, products, advertisements, radio	Rachel showed a good understanding of the basics of a radio commercial. She was able to successfully listen	I observed Rachel record the key points to five radio commercials. During a class discussion she
• Content knowledge	Skill- student has practice using multiple listening skills subject knowledge of how companies target audiences to buy their products	and pick out the key points. Rachel required no additional help in completing this task. If she felt like she missed something she would ask for it	was able to identify how companies target audiences and influence buyers. Based on each commercial she determined if she would buy
• Strategies	skill- note-taking, listening, memorization Content- identify target audience, prompts, product + special effects	to be replayed. This task may have been too easy for her.	their product or not.

For use in Equipped for the Future Field Development, Revised 1/01

the needs and skill levels of their learners. Further, the focus on careful planning that using the worksheet required paid off in more sharply focused, better organized teaching. When teachers/researchers turned to documenting student performance of tasks, we added another set of questions to the Performance Task Worksheet to provide the same opportunity to think clearly about the performance that the task may elicit and the evidence that the teacher would use to document student performance.

"The difficult part is trying to make sure that all of the prior knowledge, vocabulary, and understanding are there in order to accomplish the task. The most challenging part for me is to create a task that is not too difficult for my beginning literacy students, yet challenging for the high-level students who are all in the same class."

"My teaching becomes very focused when I'm doing the tasks. The whole process of developing the task carries over to lesson planning and helps me to be more organized. It's not that I wasn't organized before, it's just that the focusing is easier. The 'performance task' way of teaching is starting to appear spontaneously in my teaching, even teaching that is not specifically related to the performance tasks for this project."

Teacher Observation and Student Documentation Forms

As part of the initial training and support offered to participants in the 1999-2000 phase of this field development process, we outlined detailed, step-by-step procedures for data collection and reporting. Since we knew the burden of observing and documenting performance would be considerable, we urged teachers to build plenty of time into their instructional activities for them to reflect with their learners on skills being developed and tasks being accomplished in the teaching/learning process. We also encouraged them to set aside time at least once each week to document growth and change in extensive detail so that the resulting data would be useful in building a continuum of performance.

To support the process of teacher observation and student reflection, we developed a tool that focuses teachers' written observations around the dimension-related questions found on the generic Performance Continuum (which, themselves, approximated a set of observation protocols). The EFF Performance Observation Worksheet (Figure 5) structured teacher observations of performance as answers to four questions aligned to the four Dimensions of Performance:

1. What kinds of tasks can learners carry out (range)?
2. In what contexts can learners perform (range)?
3. What do learners know (knowledge base)?

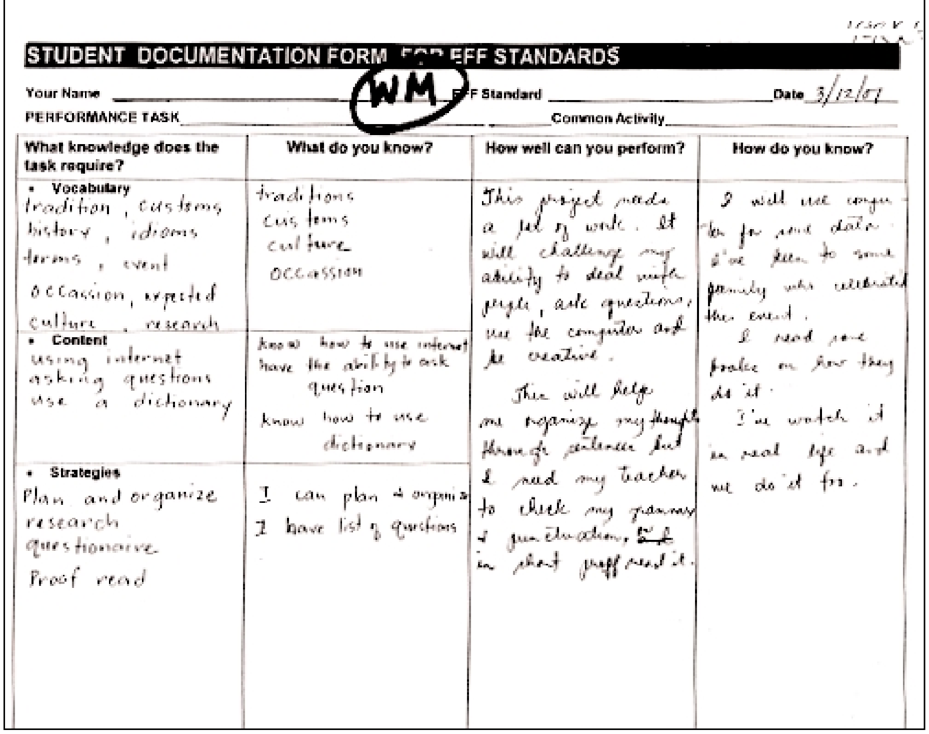
4. How well can learners perform (fluency/independence)?

In response to teacher requests, a shortened version of the form was made available for students to use to document their own learning (Figure 6).

This tool proved to be a valued resource to many teachers for diagnostic and instructional purposes, and it was used again during 2000–2001 data collection. It helped teachers to organize their observation notes in a way that made it easier to compile relevant information over time and then transfer that information to the Teacher Observation Form. Since the forms were completed at the time of observation or shortly thereafter, we found that they provided a great source of rich and detailed descriptions of performance.

"Planning and teaching for EFF performance tasks is enjoyable: I like the process, and the students seem to like it, as well. Observing student performance is one thing, but recording it is something that is going to take more practice, and it is very difficult to accomplish during the actual student performance. There are so many things going on during class that it may be helpful to have someone else do an objective recording of the process. Having a video or audio recording when evaluating performance would be helpful. Providing some free time immediately after each performance would also allow for some reflection and review of the process, an opportunity to fill in voids, and enable a more accurate evaluation of student performance. However, I'm not sure how these needs could be met."

Figure 6. Student Documentation Form



STUDENT DOCUMENTATION FORM FOR EFF STANDARDS

Your Name WM   EFF Standard ______   Date 3/12/01

PERFORMANCE TASK ______   Common Activity ______

What knowledge does the task require?	What do you know?	How well can you perform?	How do you know?
• Vocabulary tradition, customs, history, idioms, terms, event, occasion, expected, culture, research	traditions customs culture occassion	This project needs a lot of work. It will challenge my ability to deal with people, ask questions, use the computer and be creative. This will help me organize my thoughts through sentences but I need my teacher to check my grammar & punctuation, and in short proofread it.	I will use computer for some data. I've been to some family who celebrated the event. I read some books on how they do it. I've watch it in real life and we do it too.
• Content using internet asking questions use a dictionary	know how to use internet have the ability to ask question know how to use dictionary		
• Strategies Plan and organize research questionaire. Proof read	I can plan & organize I have list of questions		